7th Annual Conference on

CITY GAS DISTRIBUTION IN INDIA

Regaining Momentum: New Players, Regulations, Infrastructure and Supply

March 5-6, 2012, The Imperial, New Delhi

Organisers:

Indian Infrastructure

Smart Utilities

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CITY GAS DISTRIBUTION IN INDIA

Mission

- City gas distribution (CGD) is among the fastest growing segments in the gas sector with all major players recording rapid growth in the past couple of years. The segment would continue to grow in the coming years as well with 20 per cent growth in demand in metropolitan cities and 15 per cent in other areas. Among the customers, demand growth from the industrial segment is expected to be the fastest followed by the transportation segment.
- The CGD segment has grown on the back of a competitive regulatory environment provided by the Petroleum and Natural Gas Regulatory Board (PNGRB), which plans to roll out CGD networks in over 200 new cities by 2015. The new regulatory framework has facilitated the entry of several new players in the segment including some of the existing energy and infrastructure players, and an international major, which is exploring a joint venture with an Indian firm for gas sourcing and distribution.
- Though the long-term prospects are bright, the CGD segment has been stagnating since early-2011. While the Supreme Court had reiterated the PNGRB's authority in awarding licences for the second and subsequent rounds of bidding, the board has been unable to function due to lack of quorum. There was a change in guard at the PNGRB in October 2011 and the new chairman is expected to take up the award of licences for the second and third rounds on a priority and restart the stalled bidding process for the remaining geographical areas (GAs).
- In addition to the regulatory challenges, the segment has been facing transmission and supply constraints. Currently, the approximately 13,000 km of cross-country pipeline network does not cover a large part of the country, especially the southern and eastern regions. Expeditious completion of pipelines that have been approved by the government and award of new licences for pipelines are crucial for the development of the CGD segment. The CGD industry also faces challenges in sourcing gas for networks, particularly because the government has curtailed supply to non-core sectors including CGD due to a fall in production from the Krishna-Godavari basin. However, given the economic and environmental advantages of CGD, especially with the increasing price of competitive fuels, several operators are sourcing liquefied natural gas (LNG) for their networks.
- **The mission of this conference is to provide an analysis of the latest developments in the CGD segment with a special focus on the plans and projects of existing and new players. The conference will feature developments in regulations and regulatory processes along with pipeline progress and gas supply outlook.**

Target Audience

- The conference is targeted at:
  - Gas distributors
  - Gas marketers/suppliers
  - Policymakers and regulators
  - Infrastructure builders
  - Consulting and legal firms
  - State development agencies
  - Natural gas producers
  - Pipeline operators
  - Technology providers
  - Industrial consumers
  - Financial institutions
  - Etc.

Delegate Fee

- The delegate fee is Rs 25,000 for one participant, Rs 42,500 for two, Rs 60,000 for three and Rs 77,500 for four.

Organisers

*The conference is being organised by **Indian Infrastructure** magazine, which is published by **India Infrastructure Publishing**, a company dedicated to providing information on the infrastructure sectors through magazines, newsletters, reports and conferences. The company also publishes **Power Line** (India's premier power magazine), the **City Gas Distribution in India, Gas in India, Oil and Gas Pipelines in India** and **Captive Power in India** reports, and **Oil & Gas News** (a weekly newsletter).*

AGENDA/STRUCTURE

KEY TRENDS AND OUTLOOK

- What have been the major developments in the past year?
- What are the key trends with respect to demand, supply, prices, etc.?
- What is the medium- and long-term outlook?

INDUSTRY VIEWPOINT

- What are the plans of leading CGD operators?
- What strategies are being adopted to ensure deeper market penetration?
- Which are some of the new entrants in the segment and what are their plans?
- What are the key concerns of the industry and how can these be addressed?

REGULATORY ENVIRONMENT

- What has been the regulatory experience in CGD?
- What is the status of recently awarded CGD licences?
- What are the key focus areas of the PNGRB for the next two-three years?
- What are the key concerns?

DEVELOPMENT OF PIPELINE INFRASTRUCTURE

- What is the current status of pipeline infrastructure?
- What is the update on projects under construction or bidding?
- Which new pipelines are expected to come up in the next two-three years and what impact will their commissioning have on the CGD segment?

GAS SUPPLY OUTLOOK

- What is the current status of gas supply and its outlook for the coming years?
- What are the various sourcing options being pursued by CGD operators?
- What challenges are being faced in securing gas supplies?

SPOTLIGHT ON UPCOMING GAs

- What are the key characteristics of the upcoming GAs that were awarded through the bidding process?
- What is their current status and how does it compare with the licence requirements?
- What steps are the licensees taking to ensure that performance meets the expected milestones?

ECONOMICS AND FINANCING OF CGD PROJECTS

- What is the cost economics of gas versus other fuels for CGD customers (PNG and CNG)?
- What has been the financing experience of CGD projects?
- What are the future needs and requirements?
- What are the risks and returns?

PROJECT SHOWCASE

- What are some of the recent projects being taken up by operational and upcoming CGD networks?
- What are their key characteristics?
- What are the lessons learnt from these projects?

NETWORK OPERATION AND SAFETY

- What steps are being taken to achieve higher operational efficiencies in existing CGD networks?
- What special safety measures are being taken to ensure network integrity and safety?
- What else could the operators do to improve network efficiency and safety?

NEW TECHNOLOGIES AND SOLUTIONS

- What are the latest offerings of technology and solution providers for this segment?
- What has been the experience with these technologies?
- What are the prospects for these technologies in India?

Each session will have two parts. The first part will feature presentations by speakers. The second part will be devoted to Q&A and floor discussions. The conference will feature the points-of-view of all the key stakeholders - existing distributors, potential new players, gas producers/marketers, policymakers, financiers and investors, technology providers and infrastructure builders.

Previous Participants

The organisations that have participated in our previous conferences include ***Accenture, Acme, Adani, Alaziz Plastic, Allard Partner, Amira Foods, Angel Broking, APGIC, Arkema Peroxides India, Asahi Glass, Avantha Power & Infra, Avineon, Bhagyanagar Gas, Bhotika Pipeline, BNP Paribas, Borouge, BPCL, Burckhardt Compression, Cairn Energy, Caterpillar Commercial, Central UP Gas, Charotar Gas Sahakari Mandali, Chevron, Chemtrols, Chicago Pnuematics, Cipher Capital, Clarke Energy, Clicksoftware, Control Plus, CRISIL, DGH, Dolat Capital, Eastern Gas, East India Petroleum, EIL, E&Y, Elster-Instromet, Emerson, Enam, Engineers India, Essar Oil, ESAB, Evonik, ExxonMobil, Feedback Ventures, Ferranti, Flexflim, GAIL, GDF Suez Energy, GE Sensing, Glynwed, GLNoble Denton, GMR Energy, GMMCO, Green Gas, GSPC Gas, Gujarat Glass, Gujarat Gas, HCC, HCGDL, Honeywell, ICICI Bank, ICRA, IDBI, IDFC, Imkemex, Indraprastha Gas, IOCL, Ispat Energy, ITRON, Jain Irrigation, Jubilant Energy, Katlax, Kawasaki, Kimplas Piping, Kirloskar Oil Engines, Kirloskar Pneumatics, KPMG, KSIDC, Lanco, Logicon Engineering, Mahanagar Gas, Maharashtra Seamles, Makwana Engineering, MNGL, MIDC, Ministry of Petroleum and Natural Gas, Mott Macdonald, Mueller, NCC, NTPC, Nirmal Industries, Oil India, ONGC, Oracle, PDIL, Petro IT, PE Consulting, PNGRB, Power Engineering, PPAC, Pratibha Industries, PTT, Quippo Energy, Rai Industrial Power, Reliance Industries, Reliance Natural Resources, RMG Autometers, RMSI, Rockwin Flowmeters, Rohan Builders, Rolls Royce, RPG Raychem, Sabarmati Gas, SAP, Sandvik Asia, Saumya DSM, SBI Capital, Shell, Simon Carves, Siti Energy, Spice Energy, Supreme Industries, Surya Roshni, Swan Enviromental, Tata Power, TDW India, Technip KT ,TERI, TGE Engineering, TIL, TNGCL, Trimble Navigation, UTI AMC, Vargo Petro-Tech, Varicon Pumps, Warburg Pincus, Welspun Infratech, Wartsila, Wipro, etc.***

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Registration Form

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Delegates	One	Two	Three	Four
INR	25,000	42,500	60,000	77,500
USD	550	940	1,330	1,720

Sponsorship opportunities are available

- Registration will be confirmed on receipt of the payment. To register online, please log on to http://indiainfrastructure.com/conf.html

Payment Policy:

- Full payment must be received prior to the conference.
- Conference fee includes lunch, tea/coffee and conference materials.
- Conference fees can not be substituted for any other product or service being extended by India Infrastructure Publishing Pvt. Ltd..

Contact: Gurpreet Kaur, Conference Cell,
India Infrastructure Publishing Pvt. Ltd., B-17, Qutab Institutional Area, New Delhi 110016.
Tel: +91-11-41688859, 41034615, 9810498985 Fax: +91-11-26531196, 46038149.
E-mail: conferencecell@indiainfrastructure.com